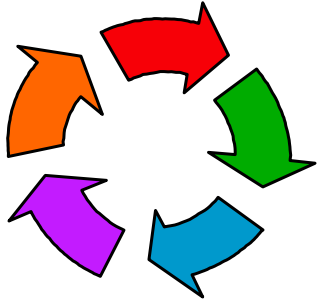




# **Summer Team Kick-off Meeting/Working Session**

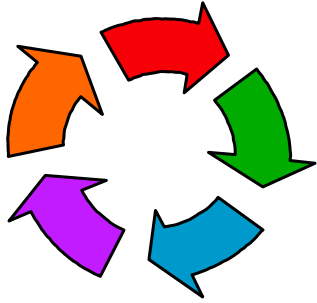
February 26, 2002



# Welcome

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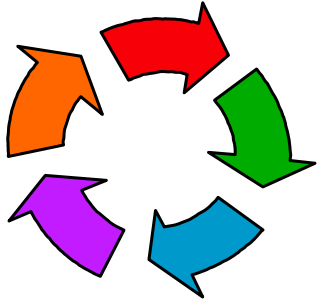
- Introductions



## Service Standards

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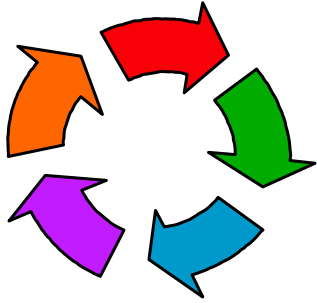
- Be worthy of trust
- Be courteous
- Deliver great products and services
- Be efficient



## Goals of the Workshop

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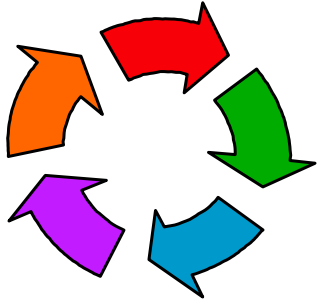
- Apply SFA U's new training development methodology to the Summer Training effort
- Plan the Summer Training effort
- Define roles, responsibilities and deliverable timelines
- Utilize standard templates and job aids to outline training design & development activities
- Gather feedback regarding the new training development methodology and ease of templates/job aids use



# Agenda

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- Introductions
- Explanation of process
- Overview of process
- Detailed plan overview
- Roles and responsibilities
- Training needs assessment working session
- Lunch
- Training plan working session
- Closing and lessons learned

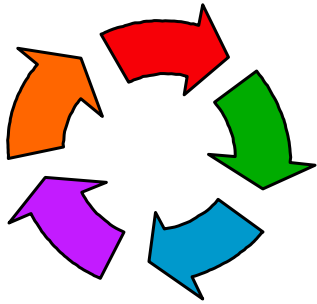


# SFA University Training Development & Delivery Process

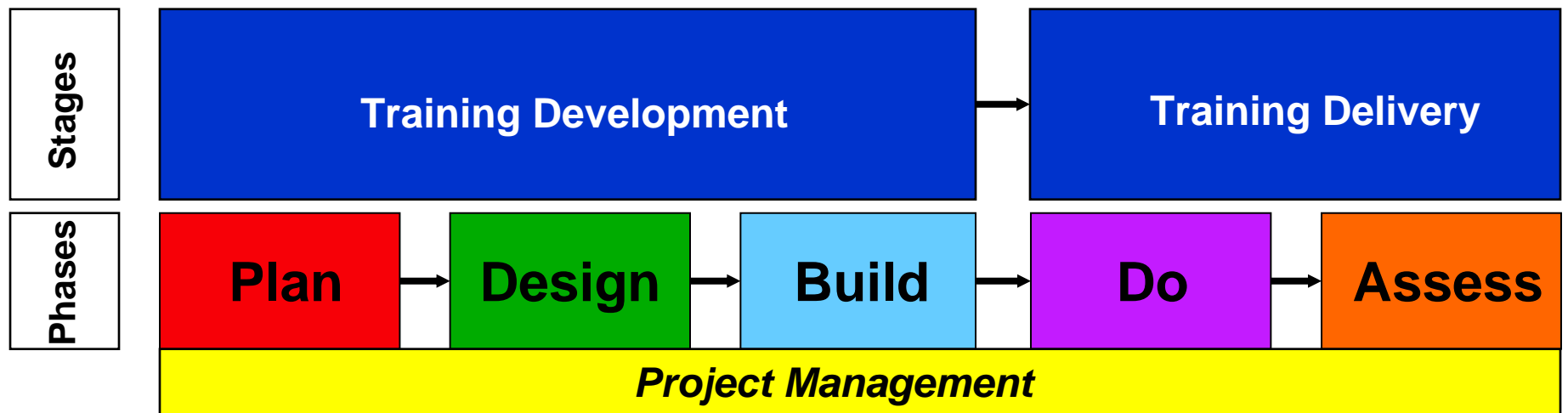
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- The training development and delivery process:
  - Provides a flexible framework for creating training programs within SFA U
  - Establishes a standard method to assist teams involved in this effort

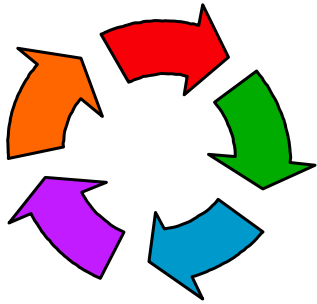


# The Phases of the Training Development & Delivery Process

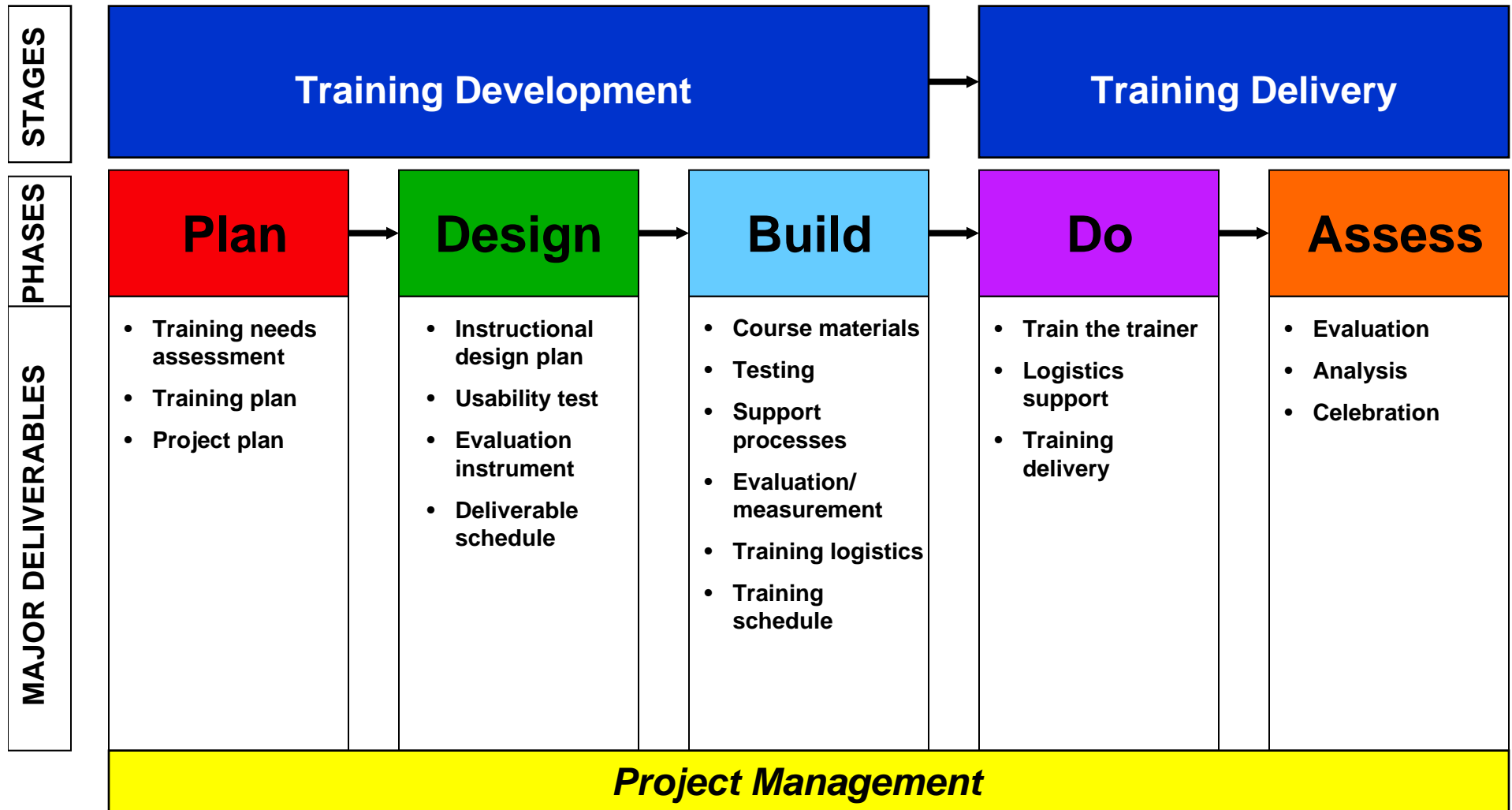


1. **Plan:** Identify training needs and create high-level plans for the project
2. **Design:** Prepare for the development and testing of training materials
3. **Build:** Produce, review, and test training materials
4. **Do:** Deliver training
5. **Assess:** Determine if the course is effective and efficient

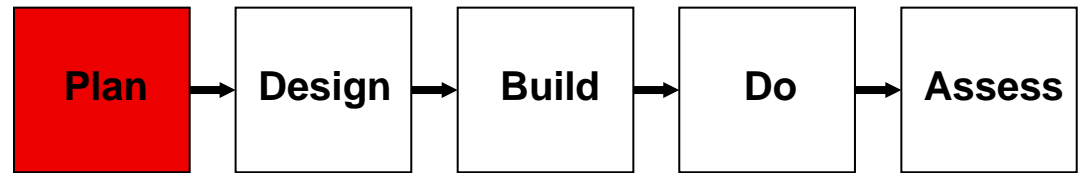
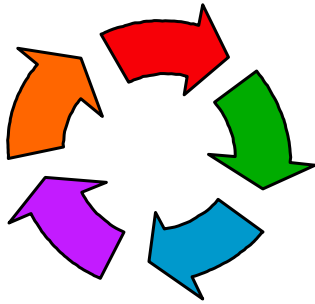
***Project Management:*** *Oversee project communication, tasks, and deliverables*



# The Training Development & Delivery Process







## The Plan Phase

**Purpose:** Collect information about the audience and determine training requirements. In Design and Build, this information helps developers meet the specific needs of the training audience and manage the scope of the training effort.

### **Major deliverables:**

#### **Training needs assessment**

- Audience analysis

#### **Training plan**

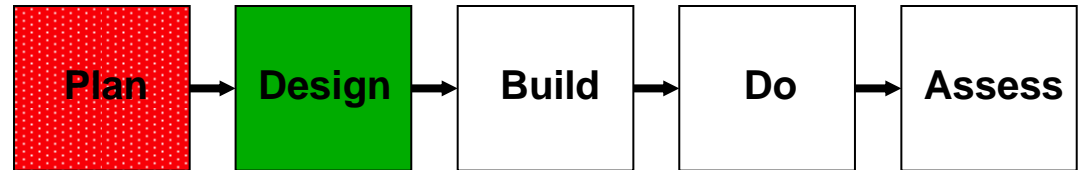
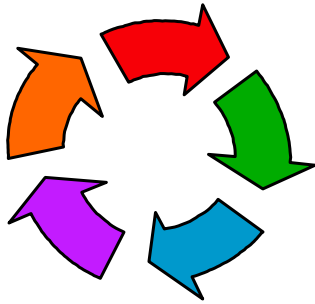
- Learning objectives
- Content scope
- Delivery strategy
- Logistics strategy

#### **Project plan**

- Role map
- Stakeholder analysis
- Workplan
- Task order

#### **Project Management**

- Kick off meeting
- Oversee project



## The Design Phase

**Purpose:** Create a detailed structure for the training course. Identify, gather, and structure all necessary information to develop materials during the Build phase.

**Major deliverables:**

**Instructional design plan**

- Content outline
- Storyboard
- Learning activities

**Usability review**

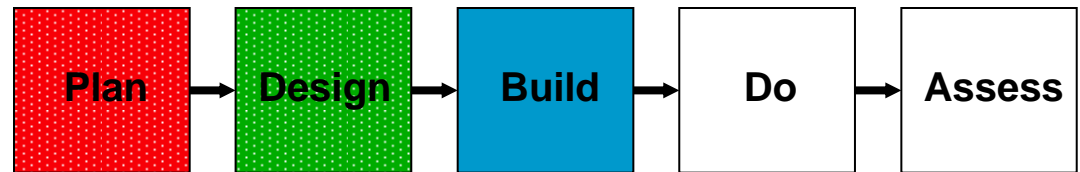
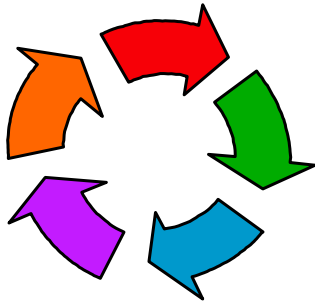
- SME review
- Sponsor/Stakeholder review

**Evaluation instrument**

- Course evaluation – Used for all courses
- Optional course specific evaluation of learning objectives

**•Project management**

- Instructional design plan strategy session
- Updates to workplan and logistics checklist
- Communication plan



## The Build Phase

**Purpose:** Create course materials for training program (classroom or online).

**Major deliverables:**

**Course materials**

- Create activities & identify examples
- Develop feedback
- Create media/graphics
- Train the trainer course, content, materials and logistics

**Testing**

- Plan & conduct dry run
- Plan & conduct internal development tests
- Plan & conduct pilot development tests

**Support processes**

- Build help/support processes

**Evaluation/Measurement**

- Develop tools & methods

**Training logistics**

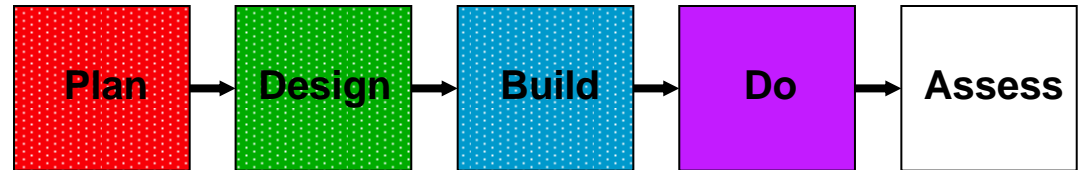
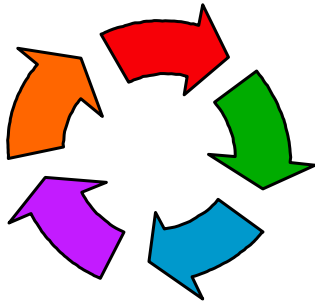
- Provide training logistics
- Package materials (Printing & shipping)

**Training schedule**

- Select trainers & sites
- Schedule training dates

**Project management**

- Conduct ongoing communications
- Oversee project



## The Do Phase

**Purpose:** Prepare for, coordinate, and conduct training.

**Major deliverables:**

**Train the trainer**

- Schedule trainers
- Conduct train the trainers (TOT) sessions

**Logistics support**

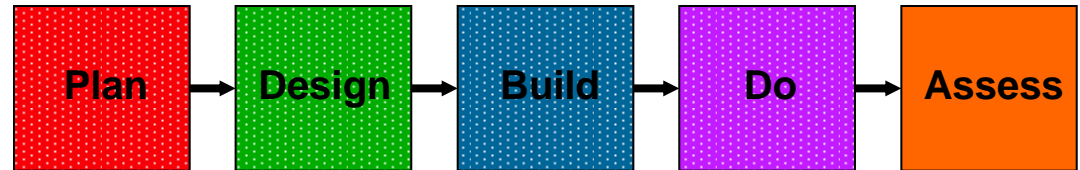
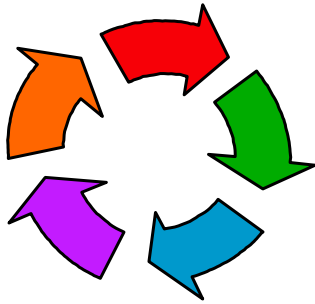
- Provide logistics support

**Training delivery**

- Registration
- Deliver training (Classroom, online)
- Conduct course evaluations
- Provide ongoing feedback to/from trainers and logistics coordinators
- Implement training maintenance plan

**Project management**

- Conduct ongoing communications
- Oversee project



## The Assess Phase

**Purpose:** Evaluate the effectiveness of the training program. This helps improve the content and delivery of the current training course and enhances future training programs.

**Major deliverables:**

**Conduct evaluation**

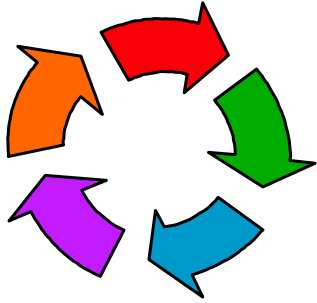
- Design effectiveness
- Delivery effectiveness
- Economical efficiency
- Summarize evaluation/measurement results

**Project management**

- Conduct ongoing communications
- Monitor project

**Analysis**

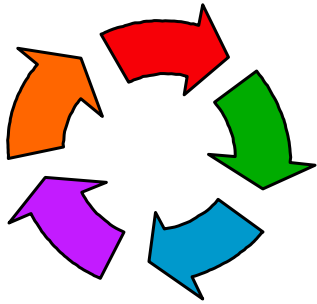
- Analyze evaluation/measurement results
- Create plan of action/make recommendations
- Celebrate



## Detailed Plan Overview

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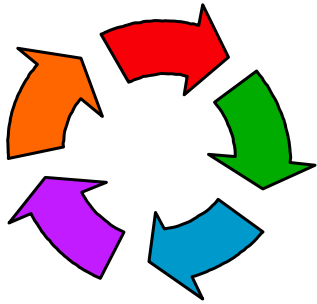
- **Why** The training request form  
(The business reason for conducting the course – sponsorship/sponsor's goals)
- **Who** Audience analysis
- **What** Learning objectives - skills  
Content scope - knowledge
- **When** (Tied to why, based on the timeframe of the need/scope of the training effort)
- **Where** Logistics strategy
- **How** Delivery strategy



## Detailed Plan Overview

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- **What are the necessary inputs to complete this phase?**
  - Training request form
  - Audience data
  - System/policy changes
  - Historical data
- **What are the outcomes of this phase?**
  - A high-level training plan which will serve to create the instructional design plan in the Design phase
  - A project plan, including a role map, stakeholder analysis, and detailed workplan
  - All of the necessary components for the Contracting Officer Representative to create a task order/statement of work, if applicable

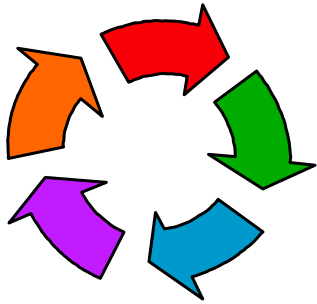


## Role Map

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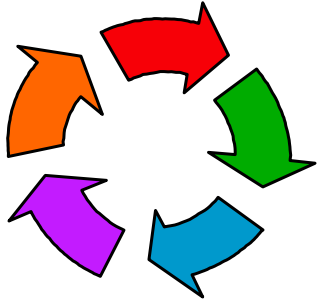
- **A role map documents and communicates each team member's individual accountability and responsibility to the project team. The role map identifies:**
  - Primary individuals necessary to complete a project
  - Responsibilities for each role
  - Relationships among roles
  - Time commitment required for each role to successfully complete the project
- **The role map is created early in the project, during the planning phase. It is developed by the team leads (with input from their team and approved by the project sponsor)**





# Role Map Template

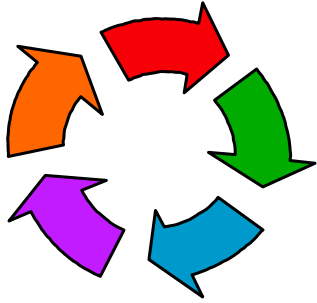
	Role	Responsibilities	Time Commitment	Who/How Many
Leadership	Project Sponsor	Set strategic direction		
		Funding control		
		Approve recommendations		
	Project Manager	Oversee project and monitor team work Review/approve recommendations and task order		
Project Team	Team Lead	Establish and support team		
		Assist in planning, designing, building, and assessing		
		Monitor work		
		Review deliverables		
	Development Team	Assist in planning, designing, building, and assessing the training course		
	Instructional Designer	Assist in designing and building the trainer/training materials and help/support processes		
	Trainers	Assist in delivering and assessing the trainer/training materials and help/support processes		



# Training Needs Assessment Working Session

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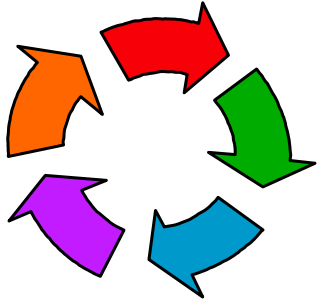
- Determine training need and target audience who will receive training
  - Training request form (Why is training necessary?)
  - Conduct an audience analysis
  - Determine learning needs



# Audience Analysis

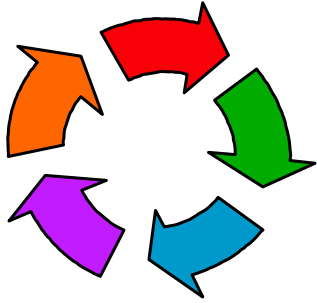
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- **An audience analysis identifies audience characteristics to be used as input into the design. It outlines and identifies audience groups and demographic factors to help target training materials to meet the specific needs of the training audience.**
- **Identifies the following factors:**
  - Audience groups
  - Number of people in each group
  - Familiarity with training subject matter
  - Geography
  - School type
  - Delivery constraints



# Audience Analysis Template

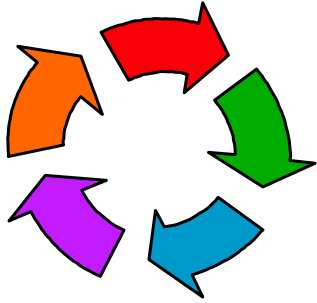
Audience Groups	Audience Characteristics								Delivery Constraints
	# of People in Each Group	Familiarity with Training Subject Matter	Geography	School Type					
				4-yr	2-yr	Priv	Pub	Prop	



# Training Plan Working Session

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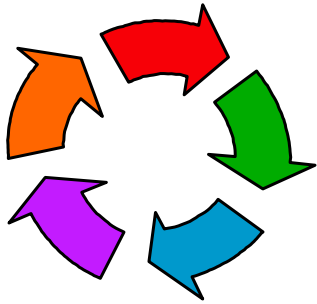
- **An training plan is:**
  - An outlined approach to training
  - Based on the needs identified by training needs assessment
  - A high-level document that will serve as the foundation for the instructional design plan developed during the Design phase
- **Includes overviews of:**
  - Learning objectives
  - Content scope
  - Delivery strategy
  - Logistics strategy



# Learning Objectives

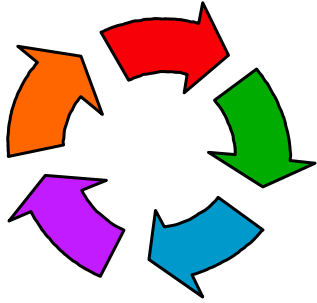
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- **Learning objectives indicate what tasks participants will be able to achieve after training. Clearly defined objectives provide a sound basis for the selection and development of instructional materials**
- **The three components of a learning objective:**
  - Performance/action
    - What should the participant be able to do?
  - Environment/condition
    - Under what conditions must the participant perform?
  - Measure/criterion
    - How well must the participant perform?



# Learning Objectives Template

Performance/Action	Environment/ Condition	Measure/ Criterion	Learning Objective
What should the participant be able to do? Is the performance observable?	What will the participant have/not have while performing?	How well must the performance be done? Speed? Accuracy? Quality?	<ul style="list-style-type: none"> <li>Related to <b>outcomes</b>, rather than <b>process</b> for achieving those</li> <li><b>Specific</b>, rather than broad</li> <li><b>Measurable</b>, rather than</li> </ul>
<i>Run the 100 yard dash</i>	<i>Dry, level track</i>	<i>Within 14 seconds</i>	<i>Run the 100 yard dash on a dry level track within 14 second</i>

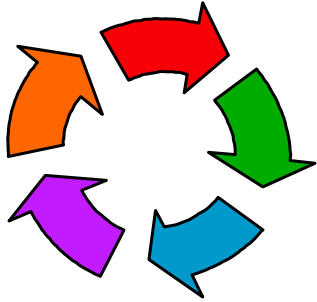


## Review of Day 1

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- Overview of training development process
- Overview of plan phase
- Roles and responsibilities
- Training needs assessment
  - Audience analysis
- Training plan
  - Learning objectives





## Preview of Day 2

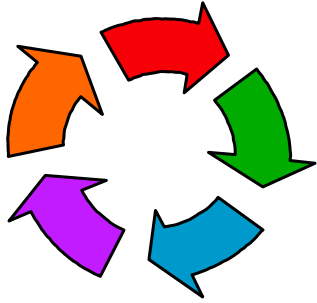
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- Continue training plan working session
  - Content scope
  - Delivery strategy
  - Logistics strategy
- Project plan working session
  - Stakeholder analysis
  - Communication plan
  - Workplan
- Next steps and evaluations



# **Summer Team Kick-off Meeting/Working Session**

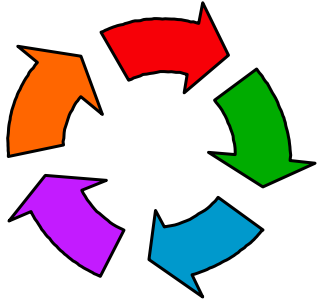
February 27, 2002



## Agenda

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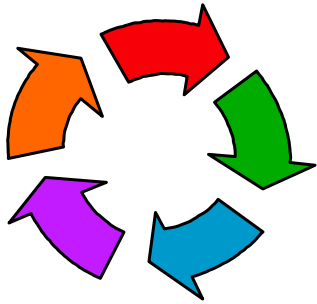
- Continue training plan working session
- Lunch
- Project plan working session
- Closing and lessons learned



## Continue - Training Plan Working Session

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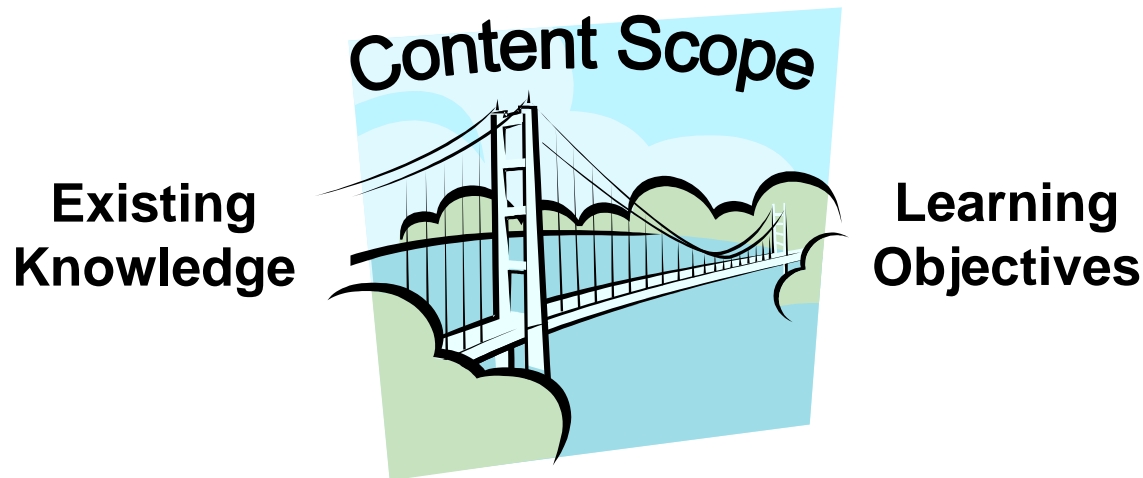
- **A training plan is:**
  - An outlined approach to training
  - Based on the needs identified by training needs assessment
  - A high-level document that will serve as the foundation for the instructional design plan developed during the Design phase
- **Includes overviews of:**
  - Learning objectives
  - Content scope
  - Delivery strategy
  - Logistics strategy

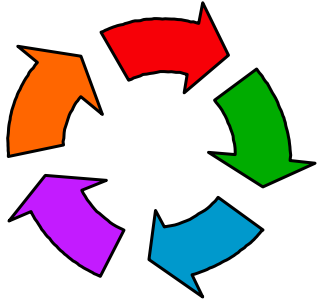


## Content Scope

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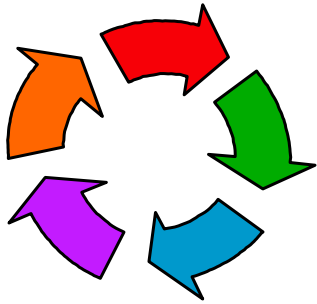
- The content scope provides a list of topics to be addressed by the training course. These topics bridge the gap between participant's existing knowledge and that which is necessary to achieve the learning objectives.





# Content Scope Template

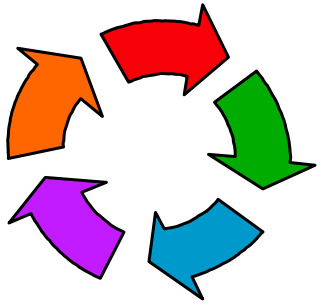
Learning Objective	Content Categories	Key Concepts
<ul style="list-style-type: none"> <li>Learning objectives indicate what tasks participants will be able to achieve after completing training. List the learning objectives for the training course in the boxes below</li> </ul>	<ul style="list-style-type: none"> <li>What are the high-level categories addressed in the learning objective?</li> <li>Organize the categories into similar groups.</li> <li>Prioritize or determine a level of importance for each group.</li> </ul>	<ul style="list-style-type: none"> <li>Which high-priority category or group of categories includes <b>new</b> information the participant needs to achieve the learning objective?</li> <li>What are the 1-3 <b>key concepts</b> of this category or group of categories?</li> </ul>
<p><i>Write a check to the delivery person for the correct amount</i></p>	<p><i>Check date</i></p> <p><i>Pay to the order of</i></p> <p><i>Check amount</i></p> <p><i>Signature</i></p>	<p><i>Pay to the order of</i></p> <p><i>Check amount</i></p>



# Delivery Strategy

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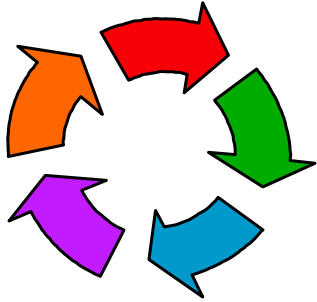
- **What is a delivery strategy?**
    - A delivery strategy is the medium used to deliver training to participants. To be effective, it must be based on sound learning objectives and compatible instructional strategies. The delivery strategy is what the participants “see” and experience, making it the most visible portion of the instructional design.
  - ***Delivery strategy (medium)***
    - Medium by which instruction is presented to participants
    - Examples: classroom, videoconference, computer-based, etc.
  - ***Instructional strategy (method)***
    - Method by which information (content) is organized and sequenced
    - Examples: case study, workshop, lecture, game, etc.
- \* The instructional strategy is determined during the Design phase. However, both strategies must be compatible with one another for an effective learning product. To begin to determine high-level instructional strategies, see attached *Instructional Strategies Job Aid* in the appendix.



# Delivery Strategy Template

		Delivery Strategy					
Factors	Questions	Classroom	Video Conference	Manual/ Paper-based	Computer-based	Appropriate Strategy	Priority
Audience							
Size of audience	How large is the audience?	Small	Large	Large	Large		
Geographic dispersion	Is the audience geographically dispersed?	Centralized	Moderately dispersed	Highly dispersed	Highly dispersed		
Performance							
Complexity of content	What type of content is it? (Awareness, application, or decision-making?)	Awareness, application, decision making	Awareness	Awareness, application	Awareness, application, decision-making		
Task simulation/need to use a system	Is the participant able to practice or simulate the training content?	Yes - learning is active, not passive	No	No	Yes- learning is active, not passive		
Collaborative work tasks	Is the participant able to collaborate with others to perform the training content/tasks?	Yes - material is conceptual and best taught in group format	No hands-on interaction unless being viewed by a group	No - self-paced, lack of interaction	Yes/No depends on type of computer based solution		

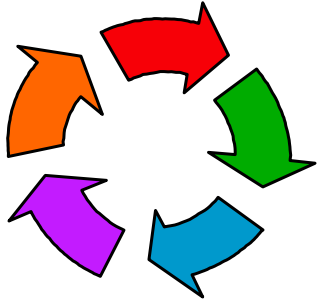




# Logistics Strategy

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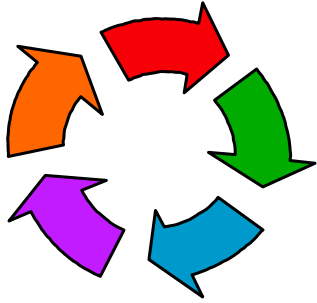
- **A logistics strategy is an overview of locations and the number of locations that will be held for a particular training course. Once the number of participants per event is determined, this summary helps to identify the type of support and materials required to complete the training**
- **The logistics strategy is completed after the plan kick-off meeting by the Team Lead and the Logistics Coordinator supporting the team.**
  - Location of events
  - Type of facility
  - Number of events
  - Number of participants per event
  - Delivery Support
  - Materials needed



# Project Plan Working Session

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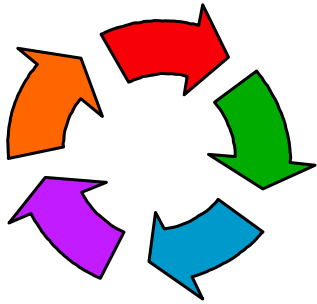
- The core management plan that includes:
  - *Role map*
  - Stakeholder analysis
  - Workplan



# Stakeholder Analysis

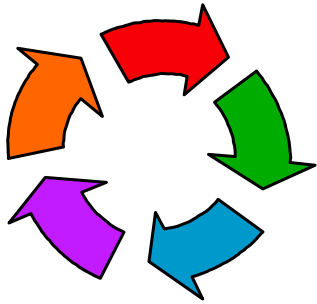
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- A stakeholder is someone who will affect or be affected by the development and/or delivery of the training. During the planning phase, potential stakeholders, and their level of involvement with the project, are identified. This contributes to the communication plan, created in the Design phase.
- The stakeholder analysis identifies:
  - Stakeholders
    - Internal (SFA) and external (schools, contractors, etc) groups who have a stake in the success or failure of the training
  - Interest in the project
    - Awareness, understanding, and/or support
  - Communication needs



# Stakeholder Analysis Template

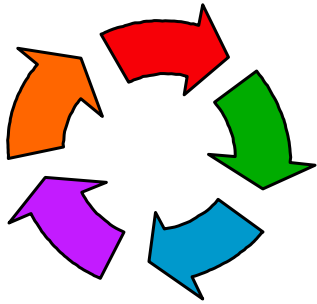
Stakeholder	Interest in Project			Communication Needs	Vehicle	Responsible	Sender	Due Dates			
The internal & external groups who will affect or be affected by the development and/or delivery of the training course				What training project information does the stakeholder need or?	How is the communication delivered to the stakeholder?	Who will be responsible to create the communication?	Who will be responsible to deliver the communication? (May be same as <b>Responsible</b> )				



# Workplan

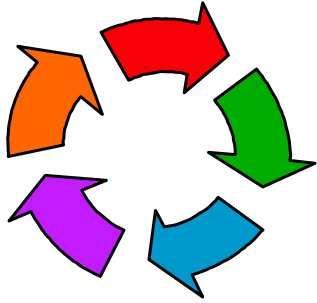
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- **The workplan serves as a roadmap for a project. It is completed by the team lead during the plan phase, with input from the team. During later phases it is updated to reflect any changes in timeframes or tasks**
- **A workplan:**
  - Defines the schedule
  - Assigns tasks
  - Confirms steps are completed as planned
- **A project manager and/or team lead uses the workplan to monitor the work effort and to identify issues to be communicated to sponsors, stakeholders, and team members**



# Workplan

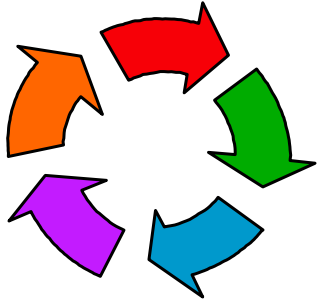
Task		Draft		Review		Final Due		Comments/Status
		Due	Complete	Due	Complete	Due	Complete	
<b>Plan</b>								
Training needs assessment								
Training plan								
Project plan								
Task order								
Project management								
Kick-off meeting								
Management sign-off								
<b>Design</b>								
Instructional design plan								
Content outline								
Storyboard & learning activities								
Usability test								
Design evaluation instrument								
Project management								



## Review of Day 2

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- Training Plan Working Session
  - Content Scope
  - Delivery strategy
  - Logistics strategy discussion
- Project Plan Working Session
  - Stakeholder analysis & communications plan
  - Workplan

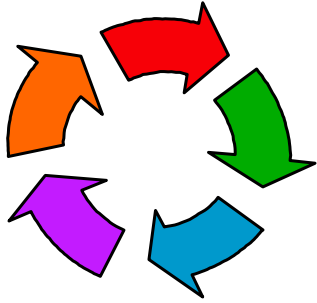


## Preview of the Design Phase

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- In Design, the following steps are completed:
  - Determine instructional strategy
  - Conduct reviews
  - Plan evaluation approach
  - Create communication plan
  - Update workplan





## Next Steps

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- Schedule
  - Next gathering / conference call
- Lessons learned
- Evaluation